



**Solicitation Information**  
**June 22, 2016**

**RFI# 7550734**

**TITLE: Electronic Procurement Software Solution**

**SUBMISSION DEADLINE: July 29, 2016 at 10:00 AM ET**

Questions concerning this solicitation must be received by the Division of Purchases at [DOA.PurQuestions8@purchasing.ri.gov](mailto:DOA.PurQuestions8@purchasing.ri.gov) no later than **July 1, 2016 @ 03:00 PM ET.**

Questions should be submitted in a *Microsoft Word attachment*. Please reference the RFP# on all correspondence. Questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

**SURETY REQUIRED: No**

**BOND REQUIRED: No**

**Sharon Louro**

**Buyer I**

Applicants must register on-line at the State Purchasing Website at [www.purchasing.ri.gov](http://www.purchasing.ri.gov)

**Note to Applicants:**

Offers received without the entire completed three-page RIVIP Generated Bidder Certification Form attached may result in disqualification.

**THIS PAGE IS NOT A BIDDER CERTIFICATION FORM**

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## SECTION 1. INTRODUCTION

The Rhode Island Department of Administration/Division of Purchases, on behalf of the State of Rhode Island, its agencies, quasi-public agencies, institutions of higher education and municipalities, is soliciting informational proposals from qualified firms to provide and implement a web-based software system for Electronic Procurement to increase efficiencies in the statewide procurement process, in accordance with the terms of this Request for Information and the State's General Conditions of Purchase, which may be obtained at the Rhode Island Division of Purchases home page by internet at [www.purchasing.ri.gov](http://www.purchasing.ri.gov).

***This is a Request for Information (RFI). No award will be made as a result of this solicitation.***

### A. Definitions

For the purposes of this RFI, the following is list of common terms and their definitions:

- a) *APA* – Agency Price Agreement, similar to a Master Price Agreement however it use is restricted to a specific agency's use.
- b) *API* - Application Program Interface
- c) *Bid Responses for Public Works website* – This website post public copies of any public works projects which a post as the bids are opened ([http://www.admin.ri.gov/bid\\_response/verify.php](http://www.admin.ri.gov/bid_response/verify.php))
- d) *Business Hours* – The State's business hours are Monday - Friday 8:30 AM EST – 5:00 PM EST, except on State recognized holidays. State calendars will be posted on the Division of Human Resources' website at <http://www.hr.ri.gov>.
- e) *COTS* - commercial off-the-shelf software solution.
- f) *CR* – Continuous Recruitment. Similar to an MPA however allows for new vendors to submit proposals to become an approved vendor during defined intervals during the CR term vs. having to wait until the contract is re-bid.
- g) *DoIT* – The State's Division of Information Technology
- h) *DOP Website* – Division of Purchases internet website, <http://www.purchasing.ri.gov/>.
- i) *Entities*:
  - i. *State Entity* - Any entity that is directly considered to be a part of the State of Rhode Island umbrella and is subject the Rhode Island General Laws. (e.g., state agencies and state run schools). A list of agencies can be found at <http://www.ri.gov/index.php#>.
  - ii. *Member Entity* - or any term referring to an entity that is related to the State of Rhode Island and can participate in procurement from the resulting Contract per R.I. Gen. Laws § 37-2-56 (e.g., quasi-public agencies, institutes of higher education, municipalities, municipal school districts, municipal regional school districts, charter schools). There are 59+/- entities and can be found at <http://www.ri.gov/index.php#>.

- j) *ERP* – Enterprise Resource Planning software system (e.g., RIFANS)
- k) *Fiscal Year* - State of Rhode Island's fiscal year is defined as July 1 through June 30. Quarterly and annual reporting will be based off of this schedule.
- l) *MBE/WBE* – Minority Business Enterprise/Woman Business Enterprise
- m) *MPA* - Master Price Agreement. MPAs cover requirements for broad categories of items for a period of time on a State-wide basis. State and Quasi-Public Agencies order their requirements for these items individually, as the need arises. State law permits municipalities and school districts to "piggy-back" the state's pricing contracts as well. MPAs are originated through the RFP process.
- n) *Off Hours, Non-Peak Hours, Non-Working Hours* – for scheduling of routine system maintenance, off hours are 5:00 PM EST – 8:30 AM EST Monday through Friday. Saturdays and Sundays are also considered off-hours however if the resources from the State are required to be available for a particular task, this will need to be scheduled in advance and per mutual agreement between the Vendor and State.
- o) *R.I. Gen. Laws* - Rhode Island General Laws.
- p) *RFI* - Request for Information.
- q) *RFP* - Request for Proposal.
- r) *RFQ* - Request for Quote.
- s) *RIFANS* – Rhode Island Financial Accounting Network System. This is an Oracle based ERP system managing the accounting software needs for the State. Includes the modules of Accounts Payables, Accounts Receivables, General Ledger, Purchase Order, iSupplier, iProcurement, Sourcing and Fixed Assets. The State is on Version 12.1.3 of Oracle.
- t) *RIPAY*– Rhode Island Payment Information System. This is an online system vendors can track the status of their invoice payments with the State Agencies.  
(<http://www.ripay.ri.gov/default.aspx>)
- u) *RIVIP* – Rhode Island Vendor Information Program. This is a customized intranet site in use to manage vendor profiles as well as an interface for Vendors to view and monitor solicitations. This software could potentially be replaced with the potential Electronic Procurement Software Solution.  
(<http://www.purchasing.ri.gov/vendors/VendorLogin.aspx>)
- v) *SaaS* - Software as a Service.
- w) *State of Rhode Island, State* - terms referencing the State of Rhode Island as a purchasing entity setting forth terms for this RFP and resulting MPA(s), Contract(s), Purchase Order(s), etc. All activities are subject to the Rhode Island General Laws.
- x) *Transparency.ri.gov* – State website in which any contract awarded for \$1,000,000.00 or greater has to be posted to the “contract” section of the website with copies of the full purchase order, fully executed agreement/contract and any additional documents as required (<http://www.transparency.ri.gov/contracts/>) for public access.
- y) *Vendor, Bidder, Offeror, Contractor, Company, Applicant* - or any other term referring to the entity that will propose goods and services to the State.

## **B. Instructions and Notifications to Offerors:**

1. Potential vendors are advised to review all sections of this RFI carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.
2. The State invites feedback from the community on any questions posed in this RFI. Please note it is not a requirement to answer all questions.
3. Alternative approaches and/or methodologies to accomplish the desired or intended results of this RFI are solicited.
4. This is a Request for Information (RFI), and as such no award will be made as a result of this solicitation.
5. All costs associated with developing or submitting responses to this RFI, or to provide oral or written clarification of its content shall be borne by the vendor. The State assumes no responsibility for any costs.
6. Responses misdirected to other state locations, or which are otherwise not present in the Division at the time of opening for any cause will be determined to be late and will not be considered. For the purposes of this requirement, the official time and date shall be that of the time clock in the reception area of the Division of Purchases.
7. Respondents are advised that all materials submitted to the State for consideration in response to this RFI will not be considered to be Public Records as defined in Title 38, Chapter 2 of the General Laws of Rhode Island. The responses may only be released for inspection upon RFI once an award of a subsequent procurement has been made, as long as the release will not place the State at a competitive disadvantage in its sole discretion.
8. Interested parties are instructed to peruse the Division of Purchases website on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFI.
9. Equal Employment Opportunity (G.L. 1956 § 28-5.1-1, et seq.) – § 28-5.1-1 Declaration of policy – (a) Equal opportunity and affirmative action toward its achievement is the policy of all units of Rhode Island state government, including all public and quasi-public agencies, commissions, boards and authorities, and in the classified, unclassified, and non-classified services of state employment. This policy applies to all areas where State dollars are spent, in employment, public services, grants and financial assistance, and in state licensing and regulation. For further information, contact the Rhode Island Equal Opportunity Office at (401) 222-3090.
10. In accordance with Title 7, Chapter 1.2 of the General Laws of Rhode Island, no foreign corporation, a corporation without a Rhode Island business address, shall have the right to

transact business in the State until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401-222-3040). This is a requirement only of the successful vendor(s).

11. The vendor should be aware of the State's Minority Business Enterprise (MBE) requirements, which address the State's goal of ten percent (10%) participation by MBE's in all State procurements. For further information, contact the MBE Administrator at (401) 574-8253 or visit the website [www.mbe.ri.gov](http://www.mbe.ri.gov) or contact [charles.newton@doa.ri.gov](mailto:charles.newton@doa.ri.gov).

## SECTION 2. REQUEST FOR INFORMATION

This RFI outlines the type of information being solicited and response structure requested from potential respondents.

### A. Background

The State of Rhode Island is soliciting proposals from qualified firms to provide an Electronic Procurement Software Solution that will drive greater process efficiencies throughout the State's purchasing process by eliminating redundant software applications in use, interfacing with RIFANS system and related websites, creating savings in processing timeframes and improve agency/vendor interactions with use of the Electronic Procurement Software Solution. The State is also looking to provide an overall improved procurement process for all State of Rhode Island agencies, quasi-public agencies, institutions of higher education and municipalities with implementation of an Electronic Procurement Software Solution. The State will be providing access and use of the Electronic Procurement Software Solution to Member Entities as designed by the State and Vendor. Member Entity participation will not be mandated, but will be strongly encouraged by the State to assist in capturing improved spend data to use on future statewide procurements. The State envisions the ability for the Vendor to coordinate independently with Member Entities looking for additional services such as integration into their financial systems and/or additional functionality.

Currently the State and Vendors interact with multiple systems for the full procurement process of which the State is looking to streamline with an Electronic Procurement Software Solution. The following are the main software systems and websites the State uses on a daily basis:

Software Systems/Websites			
Website Name	Website Address	Internal or External	Function
Division of Purchases	<a href="http://www.purchasing.ri.gov/">http://www.purchasing.ri.gov/</a>	External, Read-Only	Solicitation Viewing, Informational website

RIFANS	Internal site with limited vendor access	Internal	Financial transactions, solicitation and vendor management
RIFANS	Interactive Vendor iSupplier Portal (website with login provided with approved registration)	Limited External - Interactive	Vendor management: profile maintenance, invoice submission, payment tracking, solicitation notifications
Transparency Portal	<a href="http://www.transparency.ri.gov/contracts/">http://www.transparency.ri.gov/contracts/</a>	External, Read-Only	Public access website for solicitations >= \$1,000,000.00
Public Works Bid Posting Site	<a href="http://www.admin.ri.gov/bid_response/verify.php">http://www.admin.ri.gov/bid_response/verify.php</a>	External, Read-Only	Public access website for posting of Public Works proposals
RIPAY	<a href="http://www.ripay.ri.gov/default.aspx">http://www.ripay.ri.gov/default.aspx</a>	External, Read-Only	Public access website for vendor payment statuses
RIVIP	Internal site	Internal	Solicitation management
RIVIP (Vendor Access side)	<a href="http://www.purchasing.ri.gov/vendors/VendorLogin.aspx">http://www.purchasing.ri.gov/vendors/VendorLogin.aspx</a>	Limited External - Interactive	Vendor soft registration for solicitation access upon entering minimal information

RIFANS is the State's Oracle based ERP system. However it is not an outward facing system, which in turn creates the need for supporting outward facing software solutions. Access to RIFANS is primarily internal to State users to process requisitions for solicitations, requisitions against Purchase Orders, budget maintenance and variety of finance transactions. Vendors are able to request an 'iSupplier' vendor account which allows them access to submit invoices, review payment history and receive solicitation notifications. However vendors have to manually submit a 'RIFANS Supplier Portal Package,' which can take a minimum of 8 days to process as the State reviews and approves the paperwork. Once a vendor is granted an 'iSupplier' account in the RIFANS system, a vendor will receive automated solicitation notifications based on the commodity codes they select for their account. In addition, the solicitations are posted in a secondary outward facing system, RIVIP, that allows for the required transparency and public access per State regulations.

The RIVIP system is connected to the Division of Purchases website and allows for the actual posting of solicitation documents and easily accessible viewing of all postings for the public and vendors. The RIVIP system also includes vendor registration, however this is a limited version that grants immediate access to Vendors upon submission of minimal information and without an approval process. A Vendor can connect commodity codes to their RIVIP account as well. Consequently, many Vendors are maintaining two accounts between the RIVIP and RIFANS systems to navigate the State's full procurement process.

The Division of Purchases navigates both systems daily in an effort to post all available solicitations, notify vendors and ensure the process is transparent to the public. The process starts with an Agency creating a requisition for solicitation in the RIFANS system which feeds the RIFANS sourcing module. In turn, a Buyer will upload the solicitation and notify vendors associated to the requisition's commodity code using both the RIFANS and RIVIP. Due to the duplication of systems, the Buyer has two different vendor notification lists to coordinate as the lists differ between the systems. The RIFANS vendors will be automatically notified based on the vendor's selected commodity codes, however the RIVIP system requires the Buyer to manually download the list and email and/or mail a manually generated notification. This multi system process can lead inadvertently to confusion in the vendor community as well as the potential for missed notifications.

Oracle does have the full ability to receive and distribute electronic bids. While there is functionality, there is no true external vendor registration process in the ERP system which makes it difficult for vendors not previously registered in RIFANS to submit a timely bid ('iSupplier' registration is a manual, minimum of 8 days approval process). Since it is in the best interest of the State to ensure all interested vendors can submit timely bids, the State directs all vendors to the outward facing RIVIP system. In turn, the collection of submitted bids is currently a manual, paper-based process.

Proposals are received either by mail or hand delivered to the Division of Purchases, proposals are then stored in file cabinets until the designated opening time and the opening process is manual as physical documents are opened accordingly and bids are tabulated by paper to be uploaded after the opening. Thereafter the hard copy proposals are circulated to the designated review committee and a representative of that committee is requested to retrieve the documents at the Division of Purchases. Once a vendor(s) is selected for award, the notification process is outside both systems as the Buyer emails the applicable parties directly. The Vendor is requested to submit any additional required documentation per the solicitation such as an insurance certificate, bond, etc., as well as certification review for EEO and MBE/WBE. This documentation is manually reviewed, approved, collected and stored in the solicitation's folder with the respective Agency required to ensure this documentation is kept current during the contract term.

In an effort to support an overall statewide procurement process and make as many solicitations available to vendors as possible, Member Entities also have access to posting their solicitations on the State's RIVIP system with their solicitations viewable on the Division of Purchases website however they have their own



processes and ERP systems surrounding use of RIVIP. Member Entities are strongly encouraged to use the State's system however use is not mandatory.

In addition to RIFANS and RIVIP, the State is also required to post any award over \$1,000,000 that results from a bid solicitation to the State's Transparency Portal for further public access. This is a manual duplicative processes of re-uploading contract documentation already posted to the Division of Purchases site via RIVIP. There is also a site that requires Public Works proposals to be posted and overall bid proposal pricing made public upon opening, which includes the designated documentation provided in the Vendor's public copy version of their proposal. The State also maintains the RIPAY site, so awarded vendors and the public can track their payments.

The State's goal is to streamline this process with an Electronic Procurement Software Solution which would complement the RIFANS system while absorbing and eliminating the duplicative RIVIP and other software systems functionality and providing a more electronic procurement process. The State will have RIFANS remain as its primary ERP/financial system with the Electronic Procurement Software Solution acting as a complimentary, integrated software system to support the envisioned efficiencies for the procurement process. The State intends to initiate solicitations internally through the RIFANS with a requisition then have the RIFANS system communicate automatically with the Electronic Procurement Software Solution to transition the solicitation information and related attached files. The Buyer would then manage the solicitation lifecycle electronically through the Electronic Procurement Software Solution. The State is looking for the Electronic Procurement Software Solution to interface with RIFANS to sync key information such as the fields on a vendor profile and also link with the Division of Purchases website, Transparency Portal, Public Works Portal and potentially other systems and/or websites.

Once a contract is awarded, the RIFANS system would take over the back end of the process with the exception of vendor punch out catalogs. The State envisions providing Member Entities with access to the Electronic Procurement Software Solution as the State intends to continue to support an overall statewide procurement process. Therefore punch-out catalogs with related reporting will be a significant benefit to the State as it will allow for full spend tracking from State and Member Entities, a capability which the State does not currently have without significant effort or reliance on vendor reports. Ultimately, capturing the full statewide spend data will allow for better pricing on solicitations.

This RFI is being posted to better understand the offerings for Electronic Procurement Software Solutions in the marketplace, how it will interact with the State's systems and processes and how it can support the State's vision of bringing efficiencies to our overall procurement process.

## **B. RFI Response**

The following outline is intended to minimize the effort of the respondent and structure the response for ease of analysis. The listed questions/requirements can be used to guide responses; please note that a response to each question/requirement is not required however preferred. *Please do NOT include a cost proposal with your RFI response as they will not be considered with this RFI.* **Concise responses** in the order provided are appreciated.

### **Section 1: Vendor and Subcontractor Management**

The State envisions the Vendor and Subcontractor Management software functionality as follows (however not limited to):

- a) Vendor Registration - Ability for Vendors to self-service/self-manage their accounts, with ability for system to send notifications to designated State Agent(s) for any profile items required for review and approval. Ability for a Vendor soft registration process with minimal profile information to access a bid upon initial registration and full registration at award with review and approvals from designated State Agent(s) of additional required profile information.
- b) Automated solicitation notifications to Vendors driven by commodity code(s) the vendor registers for; to include solicitations, addenda and Purchase Order awards. Also to include notice of award to the unsuccessful vendor(s).
- c) Automated Vendor Certification process(es) (ex. MBE/WBE Certification); Ability for vendor to submit request with applicable documentation to their account and notification sent to designated State Agent(s) for review and approval.
- d) Customizable Vendor Profile fields for State Use (ex. check box for vendor preferences); Ability for State to manage unique attributes of a vendor and ability to generate reports on those attributes
- e) Vendor required document management (ex. certificate of insurance, bond); with automated notifications to submit updated documentation prior to expiration; with ability to notify designated State agent if vendor does not comply
- f) Vendor Performance –
  - i. Complaints
    - i. Ability for agencies to submit complaints with an automated notification, review and resolution process.
    - ii. Ability for the State and/or Vendor to upload any related documentation to the complaint.

- ii. Suspension and/or Debarment
  - 1. Ability for State users to process suspensions and debarments with an automated notification, review and resolution/determination process.
  - 2. Ability for the system to be locked down and restrict that vendor's access and ability to bid. If suspension has a set term, the system would track the
  - 3. If a suspension is lifted, the system would be opened up again for that Vendor's use by easily changing the status.
  - 4. Any vendor that is in a suspended or debarred status, the view in the system should be highly visible at-a-glance to any State user (e.g., different color and/or font size, different background color, highlighted status and/or other fields, other)
- iii. Fields to display current status of a complaint/suspension/debarment, State personnel assigned to the case and status fields on the complaint/suspension/debarment as well as the vendor's standing status with the State. The State would like the system to be able to have internal fields/views only viewable to State users as well as fields/views that are viewable to the State users and to the specific Vendor.
- iv. Ability for the State and/or Vendor to upload any related documentation to a complaint/suspension/debarment to the system.
- g) Links on vendor profiles to their applicable awarded contract(s) with additional links to any applicable subcontracts in use on a contract
- h) Subcontractors - Ability to track subcontractors with a vendor profile linked to the awarded vendor's vendor profile: Ability for subcontractor to upload payment documentation received from the Prime Vendor to confirm proof of payment(s); Ability to certify and report unique subcontractor attributes such as MBE/WBE, EEO, etc.

**Please provide a description of your software's capability to manage vendor registration, bid notification, related vendor profile data and vendor certification management with consideration to the State's vision listed above.**

### **Section 2: Strategic Sourcing**

The State envisions the strategic sourcing software functionality as follows (however not limited to):

- a) Online solicitation posting (RFP, RFQ, RFI, CR, Mini Bids, Reverse Auction) and applicable addenda with public access ensured; ability to adjust opening dates & times and solicitation status with ease; all postings are to be linked to the Division of Purchases website with ability to search on bid number, keywords, bid status, etc.
- b) Ability to fully manage Continuous Recruitment solicitations that have ongoing proposal submission periods for a set term within the contract (e.g., proposals can be submitted on a quarterly basis within a set period of the active Continuous Recruitment period)

- c) Ability for State and Member entities to post and manage solicitations.
- d) Competitive automated bidding options, e.g., reverse auctions.
- e) Electronic bid submission; ability for vendors to post their bid submissions with ability to keep files in a 'sealed', confidential status until process permits 'opening' of the various files, ability to select files for public access or keep internal; ability to internally share selected files with designated bid review teams members electronically through the system without adjusting any user account permissions, etc.
- f) Manage Question and Answer phase of solicitations in an online format through the system
- g) Electronic Bid tabulation, to allow for comments and/or flexibility in presentation.
- h) Electronic bid evaluation; customizable to fit standard and/or unique evaluation criteria and scoring.
- i) Electronic award notification and contract generation with links to the awarded vendor's profile. Once finalized, awarded contract is to be posted to the solicitation profile.
- j) Electronic posting of solicitation evaluation results, evaluation supporting documents (e.g., technical review determination memo) bid tabulations, contracts, purchase orders, and related documents to vendor profile and public solicitation record. The vision would be for vendors/public to have access to evaluation results as well reduce APRA (Access to Public Records Act) requests by having the related solicitation documentation already posted and available online.
- k) Ability to update any posted attachments (i.e., a contract renewal term is exercised, the Purchases team will need to replace the expired purchase order with current purchase order for the renewal term)
- l) A field to distinguish is this is a State or Member Entity solicitation as well a field to document the assigned Buyer.
- m) Release of all proposals received upon award for solicitations minus any agreed upon vendor proprietary information linked to the specific solicitation profile.
- n) Set and monitor spend thresholds as applicable

**Please provide a description of your software's capability to manage solicitation postings, bid submissions, proposal evaluations and contract awards with consideration to the State's vision listed above.**

### **Section 3: Reporting**

The State envisions the reporting software functionality as follows (however not limited to):

- a) Standard reports of the most common report requests that the system would have available to all users, non-editable.
- b) Custom reports generated by Users on any field, profile and/or document in the system their account permissions allow them access to.

- c) Ability to restrict access and/or ability to edit reports on standard reports and users to generate individual reports to store in their own folders with the ability to share with others in the system. Any user looking to make a report public must have an approval path within the established hierarchy.
- d) Make a report public without providing user accounts to the system; Ability to link a report to another state website without providing user accounts to the system;
- e) Reports downloadable into a software that allows for further editing, e.g. Microsoft Word, Microsoft Excel.
- f) Reasonable storage capacity to accommodate reports.
- g) Generate reports such as Vendor Performance, Contract Performance, and Spend Analytics (including KPI). Ability for dashboards including Demand Aggregation capabilities.
- h) Ability to convert reports into dashboards with industry standard graphics (e.g., fuel gauge with red-yellow-green color scheme, pie charts, line charts, bar graphs, etc.)

**Please provide a description of your software's capability to report on data collected and access structure to the reports in the system with consideration to the State's vision listed above.**

#### **Section 4: User Accounts and Additional Functionality(s) for Member Entities**

The State envisions the User Accounts and Additional Functionality(s) for Member Entities software functionality as follows (however not limited to):

- a) User accounts-Establish a hierarchy permissions structure in coordination with the State for full access and tiered limited access accounts
- b) Share bid documents for review and scoring between accounts without adjusting permissions on any account.
- c) State and Member entities to be issued user accounts as defined by the State project team. Ability to identify if an account is part of a State or Member Entity (potentially as granular as per state agency, quasi-public agency, institutions of higher education, municipality)
- d) Ability for Member Entities:
  - i. To access the system as defined by the State with the Vendor;
  - ii. To acquire additional functionality and/or tie-ins to their individual finance systems with a separate agreement with the Vendor and without altering the State's system. Member entities would first confer with the State to see if any additional functionality could be incorporated into the State system; if not, the Member Entity would enter into a separate agreement with the Vendor. Vendor should describe how this purchase would be approached, e.g. quote at time of request, flat rate and/or quote on additional modules with RFP proposal, other.

**Please provide a description of your software’s capability to create and manage user accounts as well as managing additional requested functionality and/or tie-ins for Member Entities with consideration to the State’s vision listed above.**

**Section 5: Vendor Catalog Integration and Enablement**

The State envisions the Vendor Catalog Integration and Enablement software functionality as follows (however not limited to):

- a) Integrate with RIFANS and any other potential system at the Member entity level.
- b) Integrate with a vendor’s existing ordering website via punch-out.
- c) Convert an awarded contract into a catalog in instances where the vendor does not have an ordering website available.
- d) Easily searchable catalogs with seamless use for an end-user to easily and successfully place an order
- e) Track spend for all State and Member entities.
- f) Control the spending per a contract’s spend threshold.
- g) Ability to restrict the catalog/contract access to a specific State and/or Member entity (e.g., APA)
- h) Reports available to analyze full spend data from State and Member entities with standard report offerings as well as customizable report options that can be developed by a user/State designated agent.

**Please provide a description of your software’s capability to integrate vendor catalogs for purchasing and spend reporting with consideration to the State’s vision listed above.**

**Section 6: System Integration to the State’s RIFANS Oracle-based ERP System and other State systems**

The State envisions the System Integration to the State’s RIFANS ERP System software functionality as follows (however not limited to):

- a) Interface with RIFANS for funds availability checking, encumbrance transactions, payment status and updates to vendor master records.
- b) Share data between the Electronic Procurement Software Solution and RIFANS for key areas such as vendor profiles, catalog management, vendor payment updates, etc. preferably employing APIs.
- c) Initially migrate existing data and documents from the RIVIP software to the e-Procurement system and elimination of the RIVIP software.
- d) Initially migrate data from the RIFANS system on vendor profile information
- e) Seamless integration to State’s DOP website to ensure continued visibility of solicitations as part of the State’s public access and transparency policy and objectives. Electronic posting of solicitation evaluation results, evaluation supporting documents (e.g., technical review determination memo) bid tabulations, contracts, purchase orders, and related

documents to vendor profile and public solicitation record. The vision would be for vendors/public to have access to evaluation results as well reduce APRA (Access to Public Records Act) requests by having the related solicitation documentation already posted and available online.

- f) Update the vendor payment records between the Electronic Procurement Software Solution and RIFANS and in turn eliminate the RIPAY system. There is an approval process that has to be maintained as the State transitions from RIPAY to the Electronic Procurement Software Solution.

**Please provide a description of your software's capability to integrate to the State systems with consideration to the State's vision listed above.**

### **Section 7: Implementation**

The State envisions the Implementation to include (however not limited to):

- a) Project Plan:
  - i. A Phased approach project plan to notionally consist of an assessment phase, proposed Electronic Procurement Software Solution based on assessment results, Technical Integration Services, Data Migration, Implementation/Training Services and ongoing support and maintenance for a defined period.
  - ii. Roles and Responsibilities defined between the State and Vendor by mutual agreement.
  - iii. Vendor and State shall each provide a project management team consisting of a Project Manager that will lead the efforts between the two teams and related subject matter experts on both teams to support the various phases of the project with the goal of a successful and timely implementation.
  - iv. A robust training plan that would consist of a train-the-trainer model that would cover the various facets of users; Procurement team, Agencies, Member Entities, Vendors, Finance team, Information technology team and administrative users. The plan would leverage in person trainings, webinars, recorded videos, help page/menus in the system.
  - v. A reasonable, notional timeline. The State is notionally envisioning 4-6 months for the project however the State is looking to the Vendor to clarify time required to successfully implement the project.
- b) System Specifications:
  - i. A cloud based software solution to include document storage.
  - ii. A 'Sandbox' test software site in addition to a 'Live' site. Procedures to test functionality in the Sandbox site before implementation into the Live site will be established between the Vendor and the State.
  - iii. Document files sizes would be unlimited so Vendors can upload timely and successfully during the solicitation posting period.

- iv. Ability for the Vendor to make reasonable customizations the State requests. Any implemented customizations will be transitioned with any system upgrades at no additional charge to the State.
- v. Ability for the State to add functionality in the future.
- c) Testing of Initial Implementation and Future Upgrades/Patches:
  - i. Vendor to provide a testing plan for initial implementation facets and a plan for each future upgrade/patch issued.
  - ii. The test plan is to specify exactly the areas of the Electronic Procurement Software Solution and State systems affected, so the designated State project team can coordinate effectively and efficiently vs. reviewing a full system document for the changes.
  - iii. Each plan is also to identify the potential risk impacts to the Electronic Procurement Software Solution and State systems.
  - iv. Streamlined communications from the Vendor to ensure changes are clearly identified to the designated State project team with the intent to focus testing efforts.
- d) Security and Technical Assistance:
  - i. Availability of a Help Desk option for users in need of assistance utilizing phone and email contact options with delineation of Vendor and State roles in the process.
  - ii. A process for technical assistance for emergency and non-emergency situations, e.g., technical difficulties, data breach, an API lost connection, system down.
  - iii. Reasonable security measures in place to protect documents and data stored on the related cloud platform. Reasonable security measures for interfacing or linked connections between the Electronic Procurement Software Solution and State systems and websites.
  - iv. A process for routine maintenance and upgrades
  - v. A data breach process and policy.

**Please provide a description of your company's capability to implement with the State on this project with consideration to the State's vision listed above.**

### **Section 8: Financing**

The State is looking for creative financing solutions for purchase of the Electronic Procurement Software Solution that would preferably reduce upfront costs and/or defer costs over time for the system. **Please provide a description of your company's options for financing or payment structure.**



### **Section 9: Other Information**

Please share any other information you feel the State should take into consideration as it pertains to:

- Any of the items above.
- Any additional or modified system capabilities the State should consider.
- Any risks/benefits the State should be aware of.
- Any other area you deem as relevant under this RFI.

### **Section 10: Attachments**

Please include any screen shots of your website, catalogs, etc. to assist in visualization of your system. The attachments will not count towards the page limit of your response however the State requests that any attachment provided be concise to supporting your response and not to inundate the review team with too many attachments.

### **Section 11: Interview and Demonstration (TBD)**

Depending on the responses received to this RFI and how they align to the State's vision, the State may call upon a Vendor to come into the Division of Purchases office at 1 Capitol Hill, Providence, RI 02908 for a live interview and demonstration to further understand the proposed software capabilities. If a Vendor is selected for a live interview and demonstration, the State will contact the vendor and schedule accordingly. Any expenses incurred for a live interview and demonstration with the State, will be at the Vendor's sole expense.

## **SECTION 3. QUESTIONS AND SUBMISSION**

### **A. Questions**

Questions concerning this RFI may be e-mailed to the Division of Purchases at [DOA.PurQuestions8@purchasing.ri.gov](mailto:DOA.PurQuestions8@purchasing.ri.gov) no later than the date and time indicated on page one of this RFI. Please reference **RFI # 7550734** on all correspondence. Questions should be submitted in a Microsoft Word attachment. Answers to questions received, if any, will be posted on the Internet as an addendum to this RFI. It is the responsibility of all interested parties to download this information. If technical assistance is required to download, call the Division of Purchases Help Desk at (401) 574-8100.

Offerors are encouraged to submit written questions to the Division of Purchases. **No other contact with State parties regarding this RFI should be attempted.** Responses to this RFI should be submitted on or before the date listed on the cover page. Responses received after this date and time, as registered by the official time clock in the reception area of the Division of Purchases, may not be considered.

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## **B. Response Format and Submission**

Submissions should be typed, single spaced on 8 ½" by 11" pages with 1" margins using Calibri or Times New Roman 12 font. Responses should be limited to twenty-five (25) pages. All pages of the Response are to be sequentially numbered in the footer, starting with number 1 on the first page of the narrative (this does not include the cover page or table of contents) through to the end, including all forms and attachments. The Respondent's name should appear on every page, including attachments. Each attachment should be referenced appropriately within the proposal section and the attachment title should reference the proposal section it is applicable to. Printed copies are to be only bound with removable binder clips.

The Vendor shall submit the following:

1. One (1) printed Paper copy, marked "RFI # 7550734 Response - Original" and signed.
2. One (1) Electronic copy in PDF on a CD-R, marked "RFI # 7550734 Response - Original". (Note: USB Drives or other electronic formats, will not be accepted)

Response package must be mailed or hand-delivered in a sealed envelope marked "**RFI# 7550734**" to:

RI Department of Administration  
Division of Purchases, 2nd floor  
One Capitol Hill  
Providence, RI 02908-5855

NOTE: Responses received after the above-referenced due date and time will not be considered. Responses misdirected to other State locations or those not presented to the Division of Purchases by the scheduled due date and time will be determined to be late and will not be considered.

Responses faxed, or emailed, to the Division of Purchases will not be considered. The official time clock is in the reception area of the Division of Purchases.

Based on the responses, the State may invite a vendor(s) to present their approach and demonstrate their technical solution.

### **Disclaimer**

This Request for Information is solely for information and planning purposes and does not constitute a Request for Proposal. All information received in response to the RFI and marked as "Proprietary" will be handled accordingly. Responses to the RFI cannot be accepted by the State

to form a binding contract. Responses to the RFI will not be returned. Respondents are solely responsible for all expenses associated with replying to this RFI.

**END**